

TRANSFORMATION STORY

Foundation *Amps Up* Community Giving Despite Small Staff Thanks to Salesforce

By Eric Thomas, Partner, Consulting

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When an employee's philanthropic idea took off and outpaced its record-keeping and reporting processes, Armanino's consultants delivered the Salesforce solutions that freed the nonprofit to do more.

Armanino Foundation (2022 Highlights)



\$2.1M

TOTAL DONATIONS
SINCE FOUNDING



19K

HOURS VOLUNTEERED



80%

TOTAL PARTICIPATION

The Highlights

The Armanino Foundation is a 501(c)(3) grant-making organization supporting nonprofits that make a positive impact on the lives of people in our communities.

The Problem

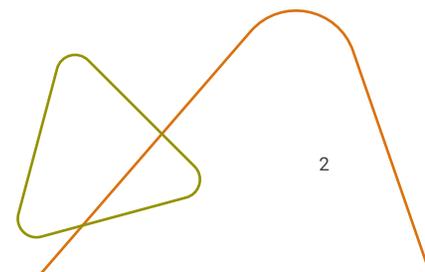
Burdened by manual processes and a lack of meaningful reporting, the foundation's small team struggled to maximize donations and volunteer opportunities.

The Solve

The foundation turned to Armanino's own consultants to identify and implement Salesforce solutions that automated administrative processes and provided better visibility into operations.

The Outcome

With streamlined processes and better reporting, the foundation's small staff was able to drastically reduce the time spent on administrative tasks and hone in on the organization's mission.



Unprecedented Donor Activity Outpaces Software Capabilities

“Now when partners ask me things like, ‘How many employees have signed up?’ and ‘What is the total amount of volunteer hours?’ I can give them answers immediately because everything is in one place within the Salesforce Community Portal.”

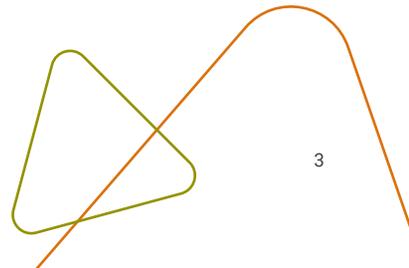
Cathy Harrington Wilkinson
Director of Foundation and Communities, Armanino Foundation

Armanino has long fostered a culture of community giving by encouraging its people to donate time and money to organizations that matter to them. When one employee proposed creating a foundation to provide a formal structure for giving, leadership was all for it. The firm established the [Armanino Foundation](#) in 2016 and it was quickly embraced across the organization. But, the foundation’s plans to expand its impact were imperiled by its own success.

Since it is in essence run by a staff of one – supplemented by Armanino employees from other areas who help as needed – glitches in reporting and a slew of manual processes added up to an enormous drain on resources. This made it a struggle to carry out the foundation’s

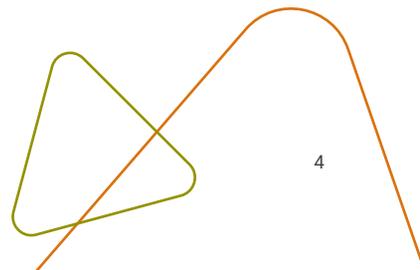
mission, especially after a string of natural disasters spurred a ramp-up in campaigns and giving.

“As our payment options and campaigns expanded, manual record keeping quickly became overwhelming,” says the foundation board chair Mary Tressel, who oversaw the foundation’s operations in its nascent days. Soon, Tressel found herself coming in early and working weekends to process donations, thank donors and manage grant payments.



When the Director of Foundation and Community Affairs, Cathy Harrington Wilkinson took over the daily operations of the Armanino Foundation, she found herself in a similar situation. For the firm's annual Great Give event, for example, employees sign up for volunteer opportunities that take place on a day that Armanino shuts its doors to regular business. More than 2,000 employees participated in the Great Give, but the software platform the foundation was using for employee signup, reporting and more failed to keep pace. Wilkinson — like Tressel before her — was mired in manual processes and inadequate reporting.

“Once I got through that first Great Give in my new position, I said to myself, ‘There must be a better way,’” explains Wilkinson. And she was right. The system the foundation was using had inefficiencies ranging from problems in signup (which resulted in duplications) to a clunky reporting function that required all data be exported into Microsoft Excel for cleanup.



Foundation Solves Automation Challenge With Salesforce

The foundation turned to Armanino's own [business software consulting](#) experts to identify and deploy solutions: a customer resource management (CRM) system and a community portal. In both cases, Salesforce paved the way.

Guided by the same Armanino consulting team that has [helped hundreds of nonprofits](#) implement key technology, the foundation selected the [Salesforce Nonprofit Success Pack](#) to automate donation management tasks (such as thank-you notes) and grant payments. In less than two months, the team implemented the Salesforce solution — loading in historical donation, volunteer and campaign data and creating year-over-year reports and dashboards.

During one Salesforce tutorial with the consulting team, Wilkinson

noticed a Volunteerism tab and asked about it. When the consultant explained that a food bank client had created an online portal where volunteers could sign up for shifts, Wilkinson's first thought was, "Why aren't we using this for the Great Give?" From there it was an easy task to convince the foundation board to have the consulting team build the Community Portal onto the Salesforce integration.

Wilkinson started discussing the portal with the Armanino consulting team in March, and it was up and running in time for the sign-up for and execution of the Great Give in late May. Throughout the process, the Armanino Salesforce consultant was constantly available to Wilkinson, building reports according to her needs and then showing her how to edit them as they went along. 5

Automation Solutions Deliver Unprecedented Efficiencies

The implementation of the Salesforce CRM was a game-changer. The foundation not only gained full visibility into donations, campaigns and volunteer hours, it could now create and run reports in a fraction of the time it took to handle them manually.

By automating the thank-you note process, Salesforce reduced that year-end effort from two full days to a matter of minutes. And because the thank-you notes included an automatically generated year-end summary of volunteer hours and donations, those letters prompted employees to further increase their giving.

For Wilkinson, one of the best parts of implementing the Salesforce Community Portal has been the almost instantaneous data and insights it provides when partners

pepper her with questions in the runup to the Great Give each year. “Now when partners ask me things like, ‘How many employees have signed up?’ and ‘What is the total amount of volunteer hours?’” Wilkinson says, “I can give them answers immediately because everything’s in one place within the Salesforce Community Portal.”

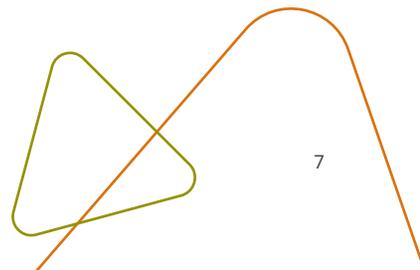
The user experience is also much easier for volunteers, and the foundation has gotten great feedback from employees. “They’ve reached out and said, ‘Sign-up was so easy! It was seamless and simple to follow, whereas the old program always used to stall on us,’” says Wilkinson. Best of all, the foundation team now has more time to focus on creating additional ways to engage employees and increase the impact of their giving and volunteerism.

Empowering a Tiny Team Helps Them Do Good by Doing Even More

Fresh on the success of the latest Great Give campaign, Wilkinson turned to the Armanino consultants once again to help her use Salesforce to streamline registrations and tracking for the foundation's Volunteer Vacation program. So far, the results have been similar: streamlined processes (i.e., no more manual input) and a seamless experience for employees.

For now, Wilkinson remains a full-time team of one for the foundation (with much-appreciated help from employee volunteers and the Armanino Foundation Board of Directors). But thanks to the implementation of the Salesforce CRM and Community Portal and continued guidance from Armanino's consultants, she's been able to

increase the foundation's impact exponentially — setting in motion everything from blood drives to expanded Great Gives and finding new ways to engage with employees and spread the word about how they can give back through the company.



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